



# **The Rethinking Resource Sharing STAR Checklist: A Tool for Improving Resource Sharing Practices**

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# Rethinking Resource Sharing Initiative

- Advocates for a revolution in the way libraries conduct resource sharing
- Purpose: To foster an updated framework of cooperation and collaboration.
  - Rethink resource sharing for the 21st century
  - Be a catalyst movement for systematic change
  - Become an influential “Think tank” – define and promote best practices
  - Inspire a change in attitude in providing services
  - Encourage libraries to open up to find new ways to serve, not just their patrons, but all potential users



# RRSI Policies Committee

- Committee Charge

- To develop and maintain policies and documents related to the ongoing activities of the Initiative,
- To manage all policy issues related to the Rethinking Resource Sharing Initiative and produce documentation as needed, and
- To facilitate communication and integration of the Rethinking Resource Sharing Initiative effort across STARS, and with other Rethinking Resource Sharing entities, including the Rethinking Resource Sharing Steering Committee.



# Levels of Best Practices



- Base Level – provided by ILL Codes
- Midpoint – other guides suggest additional practices above the base level of service
- Pinnacle – STAR Checklist is a challenge to go beyond base and midpoint services



# ILL Best Practices: Codes

- [IFLA's Guidelines for Best Practice in Interlibrary Loan and Document Delivery](#)
- [Interlibrary Loan Code for the United States](#)
- [Indiana Resource Sharing Manual](#)
- [Academic Libraries of Indiana Resource Sharing Code](#)



# ILL Best Practices: Other Guides

- *Interlibrary Loan Practices Handbook*, 3<sup>rd</sup> ed. ALA, 2011.
- [Rethinking Resource Sharing Initiative Manifesto](#) (2007)
- Hilyer, Lee Andrew. *Interlibrary Loan And Document Delivery: Best Practices for Operating And Managing Interlibrary Loan Services in All Libraries*. Haworth, 2006.



# What is the STAR Checklist?

- Checklist of 64 best practices
- Covers a variety of resource sharing operations
- Three possible answers to each question
- Score well and earn one to four stars
- <http://rethinkingresourcesharing.org/checklist.html>



# Why use the STAR Checklist?

- The STAR Checklist is designed to be challenging. Few, if any, libraries will be doing everything on the Checklist.
- The STAR Checklist provides library staff an opportunity to review and reflect on the policies and processes that comprise the resource sharing service they provide. It is made to make you think about your resource sharing practices.
- The STAR Checklist is meant to give you negotiating power when talking to administrators.





# Scoring the STAR Checklist

- The highest possible score is 128. There are four STAR levels:
  - **1 STAR:** A score of 77-89 points reflecting engagement in 60%+ of activities/initiatives/services/policies represented in the Checklist.
  - **2 STARS:** A score of 90-101 points reflecting engagement in 70%+ of activities/initiatives/services/policies represented in the Checklist.
  - **3 STARS:** A score of 102-114 points reflecting engagement in 80%+ of activities/initiatives/services/policies represented in the Checklist.
  - **4 STARS:** A score of 115+ points reflecting engagement in 90%+ of activities/initiatives/services/policies represented in the Checklist.



# Points

- “We do this now.”
  - 2 points
  
- “We plan to implement this in the next 12 months.”
  - 1 point
  
- “We do not do this.”
  - 0 points



# Certificate

- All STARS receive the Rethinking Resource Sharing STAR certificate.
  - If you get four stars...great!
    - Your library is at the forefront of resource sharing. Do your patrons and administrators and colleagues know that? Display your certificate and let them know.
  - If you get one – three stars...also great!
    - Let your administrators know how well you are doing. It can also be used to generate discussion about how you can change your practices to better serve patrons and earn additional stars.



# Instructions

- Step 1. Print out the Checklist, review the questions and develop your answers.
  - Print the PDF of the Checklist from the Rethinking Resource Sharing website so that you have time to consider each question, and indicate if the library is presently engaged in the activity/initiative/service/policy listed (2 points), or if there are plans to implement in the next 12 months (1 point), or if the library is not engaged with it (0 points). After reviewing the checklist, submit your answers online.
- Step 2. Complete the checklist [online](#)!
- For more information, contact the Rethinking Resource Sharing Star Team: [resourcesharingstar@gmail.com](mailto:resourcesharingstar@gmail.com)



# What if I get 1, 2, or no stars?

- This is usually because you are not being supported with enough budget, staff, or technology to do all that is now possible.
- Use this as a way to start a discussion with administrators about what you need and why.
- Not everything may be appropriate for every library, but most of us can do better.



# Next steps

- Toolkit
  - Hyperlinks will be added to the STAR Checklist that lead to more information about how to implement each item.
- Ideas? Suggestions?
  - If you have any ideas to add, delete or change the checklist questions or wording, let us know ([resourcesharingstar@gmail.com](mailto:resourcesharingstar@gmail.com)).



# STAR Checklist Questions

- **Ease of Resource Sharing Between Libraries**

1. Library provides online request form for other libraries
2. Library accepts fax or email requests from other libraries
3. Library accepts requests within OCLC WorldCat Resource Sharing or other union catalog
4. Library's holdings are up to date in resource sharing systems
5. Library's serials holdings are up to date within a year in resource sharing systems
6. Library generally responds to/updates lending and borrowing transactions within 24 hours
7. Library accepts requests through regional or consortial systems Examples: DOCLINE, Minitex, Fedlink
8. Library participates in local or regional courier services whenever possible to deliver materials
9. Library's lending policies are up to date with current information, including contact information and posted within the resource sharing systems utilized
10. Lending library uses ISO compliant system
11. Library is a member of a consortium with a shared catalog or discovery system



# STAR Checklist Questions

- Ease of Identifying Materials

12. Library promotes use of plug-ins/widgets for identifying and locating library materials Example: the LibX Toolbar
13. Library's holdings are discoverable in [www.worldcat.org](http://www.worldcat.org)
14. Library utilizes OpenURL to help users connect to resources
15. Library provides links to digitized collections in the local ILS
16. Library utilizes federated search tool for cross-collection searching by users
17. Library's electronic collections holdings are up to date in the local catalog





# STAR Checklist Questions

- Ease of Requesting for Borrowers

18. Library provides an online request form
19. Library processes user requests within 2 business days
20. Library has enabled automated request features in their catalog or discovery tool
21. Library has enabled unmediated resource sharing requests by users
22. Library utilizes OpenURL resolvers to make requesting items easier



# STAR Checklist Questions

- User Friendly Service

23. Library provides online status of requests for users 24/7
24. Library's borrowing policies and procedures are posted for users
25. Lending library has extended loan period (beyond traditional 30 days)
26. Library provides timely notification of impending due dates to users
27. Library utilizes interlibrary loan to request items in use by other users
28. Library loans non-returnable items to libraries outside of home country
29. Library loans returnable items to libraries outside of home country
30. Borrowing library sends requests to libraries outside of home country
31. Lending library offers incentives for early return of materials in addition to or instead of overdue fines
32. Library loans new items



# STAR Checklist Questions

- User Friendly Service (con't.)

33. Lending library allows unlimited renewals for items not needed locally
34. Library makes every effort to loan unique items Do you lend your unique or rare items? If you don't lend them, do you considering digitizing it and sharing it?
35. Library provides same level of service to all users
36. Borrowing library considers buy-on-demand before sending requests to library suppliers
37. Loaned returnables are not recalled; needed items are requested from other suppliers
38. Borrowing library offers patrons options to select location for delivery of requested returnable items
39. Borrowing library allows for direct delivery of returnable materials from the lending library to the end user



# STAR Checklist Questions

- User Friendly Service (con't.)
  - 40. Lending library provides direct delivery of non-returnable items (articles, electronic documents, etc.) to the end user via online delivery, email, or other means
  - 41. Borrowing library allows for remote (online or phone) renewals of materials
  - 42. Library conducts end-user needs assessments
  - 43. Library has online means to register for local interlibrary loan service
  - 44. Library has a service declaration in place and publicly posted committing to a minimum standard of resource sharing service for customers



# STAR Checklist Questions

- Access to a Wide Variety of Formats
  - 45. Lending library acquires copies of locally created dissertations to circulate/share
  - 46. Library loans microforms
  - 47. Library loans A/V materials Examples: CDs, DVDs, or VHS
  - 48. Library digitizes items that cannot be loaned physically, within the confines of copyright and other legal restrictions
  - 49. Library seeks methods to share public domain content digitally
  - 50. Library loans old, bound journals



# STAR Checklist Questions

- Electronic Materials

51. Library staff is aware of the sharing permissions of the licensed content at the library
52. Resource sharing staff provide input on license language for electronic content acquired by the library



# STAR Checklist Questions

- Fees

53. Lending library allows free sharing of materials whenever possible
54. Lending library charges reasonable fees that encourage, versus discourage, resource sharing
55. Lending library distinguishes fees for unique materials
56. Lending library staff has option to waive fees to encourage supply of materials
57. Borrowing library will contribute to costs of scanning unique items that cannot be loaned physically
58. Library uses OCLC IFM and/ OR DOCLINE EFTS to manage fee transactions



# STAR Checklist Questions

- Fees (con't.)

59. Library uses IFLA vouchers
60. Library participates in reciprocal agreements with other libraries
61. Library accepts credit cards for payment of transaction fees
62. Library has credit card for staff use to obtain materials from commercial suppliers for users
63. Library does not charge its library cardholders for basic ILL service
64. Library serves independent scholars who are guests of the institution





# QUESTIONS?

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